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Authorized Signature
Number: SPD-IM-11-056

Issue Date: 8/26/2011

Topic: Developmental Disabilities

How to determine the actual initial Brokerage Enrollment date for an
Subject: Individual with DD by using eXPRS

Applies to (check all that apply):

- | | | | |
|-------------------------------------|-------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | All DHS employees | <input type="checkbox"/> | County Mental Health Directors |
| <input type="checkbox"/> | Area Agencies on Aging | <input type="checkbox"/> | Health Services |
| <input type="checkbox"/> | Children, Adults and Families | <input type="checkbox"/> | Seniors and People with Disabilities |
| <input checked="" type="checkbox"/> | County DD Program Managers | <input checked="" type="checkbox"/> | Other (please specify): DD Service Coordinators, DD Brokerage Directors, DD Brokerage Personal Agents, SPD DD Regional Coordinators, SPD DD Systems Coordination Unit, SPD DD Staley Staff, |

Message: As outlined in [SPD-IM-11-047 Adult Support Service Enrollment Eligibility Criteria and Process Changes effective July 1, 2011](#), individuals must now have DD TXIX Waiver eligibility in order to be referred to and receive DD Adult Support Services. To assist CDDPs and Brokerages in finding information on an individual's "actual" initial Brokerage Enrollment Start Date, the attached "**How To...**" guide was developed.

Information on an individual's Service Eligibility, including their TXIX Waiver enrollment information is available for view in eXPRS for users with the appropriate roles/permissions. While an individual's "actual" initial Brokerage enrollment start date will be confirmed by DD Central Office staff, this "**How To...**" guide will assist users to view the information available in eXPRS. Being able to view this information directly via eXPRS may expedite the Brokerage enrollment process for the individual.

If you have any questions about this information, contact:

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How to Determine an Individual with DD's Brokerage Enrollment Start Date in eXPRS

Effective 7/1/11, individuals with DD must be eligible for the DD Adult Support Services (DDS) TXIX Waiver in order to be referred to and enrolled in DD Adult Support Services with a Brokerage. Referral and enrollment processes have been revised to reflect this new service eligibility requirement, including having the DDS waiver start date serve as the initial Brokerage service enrollment date. While confirmation of an individual's initial Brokerage enrollment date will be done by the SPD/DD Central office staff and returned in documentation to the individual's CDDP, Brokerages and CDDPs can also find an individual's initial Brokerage enrollment start date by viewing information in eXPRS.

Since the start date on the individual's first CDDP SE48 CPA that assigns a Brokerage and the Brokerage's first SE148 CPA that establishes service enrollment must align with the confirmed initial Brokerage enrollment start date, viewing this information in eXPRS may expedite the enrollment process.

To view an individual's Service Eligibility (ie: Waiver) information in eXPRS:

1. Login to eXPRS.
2. From the yellow left-hand menu, click on **CLIENT → VIEW CLIENT**.
3. In the **VIEW CLIENT** search page,
 - a. enter the individual's last name in the **LAST NAME** field;
 - b. enter the individual's prime number in the **CLIENT PRIME** field;
 - c. click **FIND**.

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Express Payment & Reporting System (eXPRS)

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eXPRS
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Client ▶ View Client

Provider ▶

Organization ▶

Contracts ▶

Prior Authorization ▶

Claims ▶

Encounters ▶

Liabilities ▶

Reports ▶

Financial Maintenance ▶

Interfaces ▶

Administration ▶

Social Security Number:

First Name:

* Last Name:

Soundex:

Birth Date:

Gender: Unspecified

Client Prime: xxx9999a

Max Displayed: 25

Find

a). Type the client's **LAST NAME** in this field.

b). Type the client's **PRIME** number in this field.

c). Click **FIND**.

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500 Summer St. NE
Salem, OR - 97301

For assistance contact the DHS Service Desk
Phone: (503) 945-5623
TTY: (503) 947-5330
Email: dhs.servicedesk@state.or.us

4. When the individual's information is shown in the results list, click on their **last name** which will be a blue hyper-link. This will open the individual's information.

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Claims ▶

Encounters ▶

Liabilities ▶

Reports ▶

Financial Maintenance ▶

Interfaces ▶

Administration ▶

Social Security Number:

First Name:

* Last Name:

Soundex:

Birth Date:

Gender: Unspecified

Client Prime: xxx9999a

Max Displayed: 25

Find

Click on the **LAST NAME** hyperlink to open the client's information.

Export options: CSV Excel PDF RTF

Last Name	First Name	Middle Initial	Title	Name Type	Birth Date	Deceased	Date of Death	Gender	Client Prime	Prime Type
LastName	FirstName			P	mm/dd/yyyy	No		F	xxx9999a	P

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- With the individual's information record now open, scroll down and click on **Service Eligibility** towards the bottom. This will open the panel to show their Service Eligibility (ie: waiver code) information.

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Express Payment & Reporting System (eXPRS)

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Client	▶ View Client
Provider	▶
Organization	▶ Legal Last Name:
Contracts	▶ Legal First Name:
Prior Authorization	▶ Legal Middle Initial:
Claims	▶ Legal Title:
Encounters	▶ Preferred Last Name: LastName
Liabilities	▶ Preferred First Name: FirstName
Reports	▶ Preferred Middle Initial:
Financial Maintenance	▶ Preferred Title:
Interfaces	▶ Birth Date: mm/dd/yyyy
Administration	▶ Deceased: No
	▶ Date of Death:
	▶ Gender: Female
	▶ Client Prime: xxx9999a
	▶ Prime Type: P

- ▶ [Aliases](#)
- ▶ [DD Eligibility](#)
- ▶ [Level of Care](#)
- ▶ [Service Eligibility](#)
- ▶ [Medicaid Eligibility](#)

Click here to expand this panel to see **SERVICE ELIGIBILITY** information for the client.

Previous
Close

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6. When looking at the **Service Eligibility** panel, check the bottom line entry in the panel. This should contain the most recent or current information for the individual's service eligibility (ie: waiver eligibility).

▼ Service Eligibility						
Authorizing Branch	A Service Category Code	Benefit Plan	B Start Date	C End Date	End Reason Code	Service Setting Group
9002	BPD	BPD	8/19/2006	3/25/2007		
2728	BPD	BPD	7/3/2007	9/18/2007		
2728	BPD	BPD	11/1/2007	4/30/2008		
2728	DDS	DDS	5/5/2008	4/29/2010	WSW	
2728	DDC	IHC	4/30/2010	9/30/2010	OTH	
2729	DDC	IHC	10/1/2010	1/31/2011	CTR	
2429	DDC	RES	2/1/2011	5/4/2011	LWS	
2429	DDS	DDS	7/1/2011	12/31/9999		

An individual is enrolled to the DD Adult Support Services waiver when you see the below information in the last entry line:

Column **A**: **Service Category Code = DDS**

This is the service category code for the DD Adult Support Services waiver.

Column **B**: **Start Date = mm/dd/yyyy**

For new Brokerage enrollees (after 7/1/11) this date will also be the individual's "actual" Brokerage enrollment date. In the example shown above, the individual's actual Brokerage enrollment date = 7/1/11. This must be the start date of their initial Brokerage service CPAs in eXPRS.

Column **C**: **End Date = mm/dd/yyyy**

If the end date of this line is 12/31/9999, that indicates that this service eligibility is ongoing. If there is a specific date (other than 12/31/9999) on this line, this will be last date this service eligibility information is/was effective. The CPA for the client may not go beyond this end date, unless there is an additional service eligibility segment that is applicable and extends the dates.

Additional information on how to use the **VIEW CLIENT** page panels, and each panel's corresponding code definitions, can be found in the **"How to View Client**

Information in eXPRS, the ***“View Client Reference Sheet”*** and the ***“DHS Client Case Codes & Definitions”*** documents from the **HELP** menu in eXPRS.